

Toni Pierce

From: Toni Pierce
Sent: Wednesday, July 21, 2021 1:11 PM
To: Sales; Mortgage Support Center
Cc: Joshua Heinrich; Justin Yahnig; Robert Anderson; Wayne Pierce
Subject: Simple Nexus

I wanted to share some information on Simple Nexus that is important moving forward.

When an LO shares their link, that link will always be usable even if the borrower does click on it after a year later or longer. HOWEVER, once the borrower clicks the link and is taken through the process to create their account, they have 9 hours to set up their account. That entails: adding first and last name, creating password, accepting the agreement.

So for example, if I am a borrower and receive a share link from your LO. If I click on the link but do not finish creating my account and get distracted with having to cook dinner, wash the dishes, watching tv, and going to bed and 9 hours have passed and I just remember, oh I still have to finish creating my account. Then I will be directed to the default LO.

We have recently changed my account to the default LO account. When I have one of these files hit my account, I will send an email out to the LO's in the region the application is located in. It is not an application that is "up for grabs", it belongs to someone and I ask that the response be limited to the person the lead belongs to and not persons who would like to have the lead. 😊

Once the LO is identified as the owner of the lead, it will take about an hour or so to get the application transferred from my Simple Nexus to theirs.

Just wanted to make sure everyone understands this process. If you have questions, let me know! Hopefully there won't be too many of these.

Please allow 24 hours for a full response from Mtg Support!

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